APPROVING A REQUISITION

PEOPLESOFT

Once you have logged into PeopleSoft, find the four links in the top right corner of your screen (Home, Worklist, Add to Favorites, and Sign out). **Click on the Worklist link**. (You may also use the link in the e-mail notifying you of the required approval. This will take you directly to the approval panel.)

A screen will come up with a list of requisitions that are currently awaiting your approval. In the "Link" column, you can see the Business Unit and Requisition ID number in case you are looking for a particular document to work on first. Otherwise, you should simply **click on the "Link" column** for the first item in your list.

> **NOTE: If a particular requisition does not appear in your worklist, either someone else has already taken action, or the requisition is not ready for your approval. Check the status of the requisition at eProcurement > Manage Requisitions. (See the "Finding the Status of your Purchase" Quick Reference Guide.)**

The approval panel will show two buttons at the top right corner of the page—"Approve" and "Deny". Once you have seen the necessary information, you will click on the appropriate choice. To see the details, **click on the View Request Details** link near the bottom on the right side of the page.

From the Detailed Summary panel, you should be able to see all of the pertinent information to help you make a decision to approve or deny. **Click the Return to Previous Page link** to complete the approval.

Once you have seen the details, you will want to look over the justification at the bottom of the Requisition Approval panel. Depending on whether or not everything is in order, **click the 'Approve' button or the 'Deny' button** at the top right corner of the screen. If you are denying a requisition, you will be required to give an explanation in the comments section before clicking the 'Deny' button. You may include comments when approving a requisition by typing them before clicking the 'Approve' button, but comments are not required.

This completes the approval process. To continue with other requisitions, **click on the Worklist link** at the top of the page.

ADDITIONAL INFORMATION FOR THE APPROVER

As an approver, you may be looking only at one aspect of the purchase. For instance, one approver might only be responsible for determining whether or not the item(s) or service(s) are truly needed and/or justified. Another might only be interested in the accounting information. While still another might be mainly interested in seeing how the order was entered and verifying that all of the necessary information has been included. To see the whole picture of the approval process for a requisition, it is helpful to know who else will be approving or has already approved it. All of this information is easily accessible to the approver from the approval panel. The rest of this document is intended as a detailed explanation of the information available from the worklist and approval panels and how it can be accessed.

Worklist panel…

On the Worklist panel before you click on the link, there is some helpful information. You can see on each requisition who last worked on it before it came to you in the 'From' column. If you are the first approver in the chain of approvals, the person listed will be the requestor. Otherwise, it will be the previous approver. Also on the worklist panel, you will see the date it appeared on your worklist so you know how long it has been sitting waiting for you to take action. To the right of the link, you will find a 'Reassign' button. This allows an approver to give the requisition to someone else for approval instead of taking action personally. To get back to this button after viewing the requisition, simply click the 'Worklist' link at the top of the page again.

Rule ID…

After clicking on the link, you come to the Approval panel. At the top left of the screen, you'll find the 'Rule ID', which explains why you were included in the approval chain. However, it is possible that one person might fill multiple approval roles. If that is the case, only the first role will be displayed, but all of them will be taken care of when 'Approve' is selected.

Requisition Status…

Under the "Approve" and "Deny" buttons, you will see the "Requisition Status" and the "Approver Action". The requisition status will say "Pending Approval" and will only change upon your approval if you are the last person in the approval chain or if you deny the requisition. The approver action will say "Pending" until you choose to approve or deny the requisition.

Comments…

The comment box is available for you to record any message or note that you would like to have attached to a particular requisition. This is an optional step if you are approving the requisition, while it is mandatory if you deny it. Any comments must be added *before* clicking "Approve" or "Deny".

Adding Approvers…

As an approver, you may add other PeopleSoft users as approvers or reviewers for a particular requisition. To do this, simply select "approver" or "reviewer" and type the user ID of the person you would like to add to the workflow. If you select "approver", that person will be required to take action (approve or deny). However, if you select "reviewer", the person added will be able to see all that you see as an approver but will not be required to take action. They would not even have to look at the requisition in order for that document to be fully approved and carried forward in the purchasing process.

Approval Workflow…

Before deciding to add someone to the approval workflow, you must know who is already involved. To see the list of necessary approvals, click on the yellow triangle next to "View Approval Comments/History". This will display all of the required approvals and who will take care of each step. In some cases, instead of naming one particular person, you will see "Multiple Users". Once you have seen the approval workflow map, you can click on the yellow triangle again to collapse this section.

Requisition Information…

The Requisition Information section displays the Business Unit, Requisition ID, Requestor ID, and the Requisition Date. This section also shows the Business Unit Name, Requestor Name, and e-mail address in case contact with them is necessary before approving. Below all of that is the justification for this requisition, which should explain the necessity of this purchase.

Attachments…

You've already seen what can be found through the View Request Details link. Above that link, there may occasionally be a paper clip icon. This will display any attachments that have been added to the requisition electronically. Some users may opt to attach specifications in hard copy, which means that you cannot review them through PeopleSoft. If your decision to approve or deny a requisition depends on the specifications and they are not attached electronically, you will need to contact the requestor for a hard copy.

Requisition History…

At the bottom of the approval panel, there is a section titled "Requisition History". This is a list of all of the comments entered and actions taken for this requisition thus far. Here you will find the justification listed each time the requisition was saved, as well as evidence of editing, cancellation, reopening, other approvals, and any other comment someone might have chosen to add along the way.

Editing the Requisition…

The last function available to you is the Edit Requisition link at the bottom of the approval panel. If you choose, you may click this link to make changes to the requisition instead of denying it and giving instructions to the requestor as to what should be amended. For questions about how to find and edit information on a requisition, you may contact Kathy Evans or Brian Woods in IDOA Procurement Division.

Delegating your Approval Authority

As an approver you have a responsibility to ensure that purchases can be processed in a timely manner. If you are the only person that fills a particular approval role, this means that you need to delegate your approval authority to a responsible party in your absence. It is up to your discretion to decide when it is necessary to delegate and to whom you should give your authority. The only stipulation is that the person chosen must have a current PeopleSoft ID.

Menu Navigation:

- **eProcurement**
  - **My Profile**

At the bottom of the profile panel, there is a section titled “Alternate User”. In the “Alternate User ID” field, enter the PeopleSoft User ID for the person to whom you are temporarily delegating your authority.

> If you are unsure of their ID, you may click on the magnifying glass to search. The fastest way to search is by typing the first letter of the person’s first name next to “User ID begins with”. This will bring up a list of all PeopleSoft users with a first name that starts with that letter. You should be able to scroll through the list to find the person you are looking for. It may be helpful to click on the Description link at the top of the results column. This will sort the list in alphabetical order by last name. Once you have found the right person, click on that ID to return to the profile panel.

Next, you will need to indicate the effective date range for this delegation. You may type the dates in the boxes or select them from the calendar by clicking on the calendar icon .

> **IMPORTANT: All requisitions submitted before 12:00am on the “From” date will still be routed to you. It is best to delegate your authority at the end of your last day in the office, and enter that date as the “From” date. No requisitions will move from one worklist to another. This delegation of authority only applies to requisitions submitted within the effective date range you select.**

Once you have completed these three fields, **click the Save button** at the bottom of the page.